Issues Raised at the ECHO Operations Workshop, Subsequent Teleconference and Various Correspondence.

Many issues relevant to the topics discussed in this document were raised at the ECHO Operations Workshop, June 6-7, 2002, and the ECHO Operations Plan teleconference, July 23, 2002. We have tried to address them in this document. Some issues may still need further discussion and focus. The table below summarizes the issues raised at the workshop and the teleconference, and shows the section where the issue is addressed. Additional comments are stated, especially when the nature of the current development status leaves some details to be determined (TBD) and described later. Section numbers are for the present Version 1.0 of 12/10/02 unless otherwise specified.

Issues Raised at the ECHO Operations Workshop, June 6-7, 2002				
No.	**Issues**	**Section**	**Content**	**Comment**
1	Who audits the contents of ECHO against the contents of a Provider?	3.2.1.3	Operations Staff, when something is not functioning correctly	EOMG generates report, Data Provider checks
2	What is the operational burden of providing metadata updates to ECHO?	3.2.1	Data Provider Interactions	
3	Who manages data reconciliation?	3.2.1.8	Metadata Reconciliation	
4	Who investigates, resolves, problems?	4.2 4.5.2	System Monitoring System Recovery	
5	What are the core set if attributes?	A.3 3.2.1.7 3.2.1.8	Core Attributes Metadata Mapping Metadata Reconciliation	
6	Use of GCMD, CIP	3.2.1.8	Metadata Reconciliation	
7	Uncontrolled keywords	3.2.1.8	Metadata Reconciliation	
	Order Issues	**Section**	**Content**	**Comment**
8	Order Status Information	3.2.3.2	Order Brokering Support	
	Operations Issues	**Section**	**Content**	**Comment**
9	System Performance Monitoring and Resolution	4.0	System Operations and Maintenance	
10	Unworkable load on the system	3.2.1.9	System Resources Impact	
11	7x24 ops plan Weekend/night support	4.3	Operational Constraints	No night weekend plan.

12	RMA plan	4.0	System Operations and Maintenance	Closed, changes made
13	Responsibility for Performance Monitoring	4.6	Performance Monitoring	
14	Effects of addition of new providers and new clients	4.6	Performance Monitoring	
15	If Ingest fails	3.2 3.2.1.5 3.2.1.6	Specific Operational Functions Initial Metadata Ingest Metadata Update	
16	Performance baseline	4.6	Performance Monitoring	
17	Quota for providers	3.2.1.9	System Resources Impact	
	Provider Issues	**Section**	**Content**	**Comment**
18	Who decides to accept a provider?	3.2.1.1	Data Provider Acceptance and Registration	
19	Usefulness of ECHO to the provider	2.0	Overview	
20	Provider changes data model	3.2.1.6 3.2.1.7 3.2.1.8	Metadata Update Metadata Mapping Metadata Reconciliation	
21	Template for ops agreement between ECHO and provider	3.2.1.2	Template Agreement for Data Provider	
	Client Issues	**Section**	**Content**	**Comment**
22	Template for ops agreement between ECHO and client	3.2.2.2	Template Agreement for Client Provider	
23	Will Echo allow all clients?	3.2.2.1	Client Provider Acceptance	Client operations monitored – can review for removal from the system
24	Mechanism for blocking a client	3.2.2.1	Client Provider Acceptance	Client API
25	Does ECHO block all clients and then add them as they are sanctioned?	3.2.2.2	Template Agreement for Client Provider	
	Service Issues	**Section**	**Content**	**Comment**
26	Policy on user services for clients	3.2.2.4	ECHO End Users	
27	Whom do customers contact for their problems?	3.2	Specific Operational Functions	

28	Whom do user services contact for their problems?	3.2.2.4 3.2.3.2	ECHO End Users Order Brokering Support	
29	Who investigates orders that have run afoul?	3.2.3.2	Order Brokering Support	
	Data Model Issues	**Section**	**Content**	**Comment**
30	What happens when ECHO Data Model changes?	3.2.1.8	Metadata Reconciliation	

<table>
<tr><td colspan="5" align="center">Issues Raised at the ECHO Operations Plan Teleconference,
July 23, 2002</td></tr>
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	Issues	**Section**	**Content**	**Comment**
31	Add a Glossary	Appendix B	Glossary	Closed, placeholder added for later population.
32	Add an Index			Open, this will be added when document is not as dynamic
33	Add a Change Management Section for Hardware, Software, Database, and 3rd Party Software	6.0	Change Management	Closed, section added
34	Discuss performance monitoring for exhaustive searches			Open, TBD
35	Discuss coincident searches			Open, TBD
36	Statistics/Metrics requirements (searches, system performances, accounts, domain traffic, client traffic (popularity), User Characterization	4.6	Performance Monitoring	Closed, changes made
37	Responsibility for various roles discussed throughout document was not clear			Closed, changes were made to clarify roles and responsibilities.
38	Address who is responsible for granules, who is owner of granules	3.2.1 (draft 7/15/02) 3.2.1 (draft 8/14/02) 3.1.2 (present draft)	ECHO Operations ECHO Operations and Maintenance Group (EOMG)	Data Provider. Clarification may be made if present draft needs to be changed.
39	Remove items 3, 4, and 5 until implementation. Possibly note future plans in appendix	3.2.2 (draft 7/15/02) 3.2.2 (draft 8/14/02) 3.1.3 (present draft)	Providers Providers Data Providers	Closed, items removed.
40	Discuss proactive management of hardware needs for new providers	3.2.4.1.1 (draft 7/15/02) 3.3.1.1 (draft 8/14/02) 3.2.1.1(present draft)	Provider Registration Provider Registration Data Provider Acceptance and Registration	Closed, change made
41	How quickly do ACL changes	3.2.4.1.3 (draft	Access Control	Closed, change

	take affect in ECHO after submission?	7/15/02) 3.3.1.3 (draft 8/14/02) 3.2.1.4 (present draft)	Management Access Control Management	made